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## Brazil's Meat Exports Strong

Brazil's meat exports of beef and poultry have been very strong. Pork exports fell in 9% volume, however, high pork prices pushed the value up 20%. From July 2003 through June 2004 meat exports totaled 3,757,329 metric tons, up 12 % from the same period a year earlier. The value was \$5 billion, up 45% compared to July 2002 through June 2003. During this period, exports of chicken rose 12% in volume and 42% in value, processed chicken increased 21 % in volume and 17% in value, and turkey grew 20% in volume and 61% in value.

For the month of June 2004, exports of chicken parts totaled 140,348 metric tons, up 39% compared to June 2003. The value jumped 82%, to \$169 million from \$93 million in June 2003. Exports to Canada exploded to 1,700 mt. from 524 mt. a year earlier. Canada suffered a heavy loss of poultry due to an outbreak of avian influenza earlier this year in British Columbia. Exports to the Netherlands and Germany fell. The Netherlands has recovered from a massive culling of poultry in 2003 that was due to an outbreak of avian influenza.

Source: Brazil Ministry of Agriculture

## Russia Lags on Meat Imports

Russian imports of meats fell sharply during Jan-Mar 2004, compared with 2003, due to poor implementation of the TRQ on beef and pork and the quota on poultry meat. Shipments of meat and poultry are reported to have returned to normal levels beginning in April 2004. Customs data shows that total poultry imports reached 98,000 MT in April, as companies try to compensate for the permit problems of Q1.

## Total Russian Imports of Meat Products, in metric tons Jan - Mar 2002-2004 comparisons

HS Description	2002	2003	2004	% Change 04/03
02 Meat	627,218	678,040	364,920	-46.2
0207 Poultry Meat, Offal	319,581	300,112	156,110	-48.0
0203 Pork, Fresh or Frozen	115,973	165,924	72,590	-56.3
0202 Beef, Frozen	93,797	112,861	51,338	-54.5
0206 Edible Animal Offal	47,551	51,727	40,504	-21.7
0201 Beef, Fresh/Chilled	7,014	3,316	1,610	-51.5

## Total Russian Poultry Imports by Exporter, 0207 Poultry Meat, Offal

	2000	2001	2002	2003	Jan-Mar 04
1 U.S.	504,275	1,062,943	748,949	735,318	105,591
2 Brazil	15,193	94,004	295,200	194,053	19,984
3 Germany	17,500	43,751	56,446	53,668	7,665
4 France	44,746	71,000	91,225	75,336	9,704
5 Poland	2,004	2,293	3,865	18,126	4,462
6 Belgium	23,299	40,766	47,864	16,445	2,441
7 U.K.	32,768	15,270	27,577	23,785	1,819
8 Finland	84	1,910	3,935	3,964	654
9 China	1,030	8,608	29,605	26,372	1,104
10 Spain	677	2,693	3,657	10,280	747

Source: USDA/FAS

## Brazil Exports: Beef, Poultry and Pork

	Jul 03 - Jun 04		Jul 02 - Jun 03	
	'000 US\$	MT	'000 US\$	MT
Beef	1,548,497	725,715	907,579	550,120
Processed Beef	405,844	192,444	331,222	174,951
Chicken	2,142,547	2,119,803	1,510,798	1,898,986
Processed Chicken	93,536	40,738	79,892	33,738
Turkey	192,943	120,986	120,092	100,821
Pork	588,922	446,030	491,480	491,001
Other meat	117,145	111,613	75,652	94,123
Total	5,089,434	3,757,329	3,516,715	3,343,740

Source: Brazil Ministry of Agriculture

## Brazil Exports of Chicken Cuts, US\$ in thousands

	June 2004			June 2003		
	US\$	MT	US\$/mt	US\$	MT	US\$/mt
Japan	52,682	31,914	1,651	16,433	16,005	1,027
Hong Kong	16,103	23,201	694	10,063	19,312	521
Netherlands	12,574	6,957	1,807	16,607	10,114	1,642
Russia	12,336	14,266	865	2,947	5,921	498
Germany	12,027	6,084	1,977	19,134	11,857	1,614
UK	11,370	4,940	2,302	6,674	3,831	1,742
Singapore	6,630	5,628	1,178	2,059	2,854	721
So. Africa	5,704	10,884	524	2,995	7,927	378
Canada	5,684	3,344	1,700	731	524	1,395
Saudi Arabia	5,106	2,967	1,721	354	326	1,086
UAE	3,520	2,589	1,360	1,051	974	1,079
Ukraine	2,941	3,716	791	442	942	469
Romania	2,787	3,201	871	2,346	4,226	555
China	2,017	2,884	699	38	105	362
Bulgaria	1,948	1,607	1,212	724	890	813
Sub-total	153,429	124,182	1,236	82,598	85,808	963
Others	15,593	16,166	965	10,497	15,016	699
Total	169,022	140,348	1,204	93,095	100,824	923

Source: Brazil Ministry of Agriculture

## EU Extends Ban Due to Avian Influenza in Asia

On July 26, 2004 the European Commission announced a decision to continue the suspension of imports into the EU of chicken products and pet birds from several Asian countries where avian influenza has been confirmed since the beginning of this year. The existing ban, which is in effect until August 15, 2004, was extended to December 15, 2004. The countries affected are: Thailand, Cambodia, Indonesia, Japan, Laos, Pakistan, China, South Korea and Vietnam.

Source: European Commission Midday Express

**Inspected Egg Products-U.S. & Canada Export/Import Trade****U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending July 24, 2004	Year-To-Date			
TYPE	2004	2003 /1	2004	2003
Liquid	352	256	7,691	9,140
Frozen	0	0	11	96
Dried	0	0	434	325
Total	352	256	8,136	9,561

**U.S. Imports From Canada, in Pounds (000) (Preliminary)**

Week Ending July 24, 2004	Year-To-Date			
TYPE	2004	2003 /1	2004	2003
Liquid	312	127	3,946	3,154
Frozen	64	0	1,013	1,589
Dried	40	4	1,687	821
Total	416	131	6,646	5,564

**Inspected Shell Eggs****U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending July 24, 2004	Year-To-Date			
TYPE	2004	2003 /1	2004	2003
Jumbo	0	17	272	273
Extra Large	1,035	180	53,520	12,887
Large	4,235	2,340	127,634	58,154
Medium	3,762	0	57,920	34,953
Ungraded	3,936	2,880	175,200	50,846
Misc	780	0	15,504	3,432
Total	13,748	5,417	430,050	160,545

/1 Comparable Week, to-date figures may not total due to rounding.

/2 Includes revisions to previous week (s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News Branch.

**LIVE POULTRY SLTRD UNDER INSPECTION** W/E 24-Jul-04  
(PRELIMINARY)**U.S. FOWL SLAUGHTERED DOMESTICALLY**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
Head	1,438	1,484	2,922
Last Week	1,614	1,420	3,034
Same week yr ago	1,105	1,459	2,564
To-date/2004	39,110	37,899	77,009
To-date/2003	46,107	39,980	86,087

**U.S. FOWL SLAUGHTERED IN CANADA**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
Head	336	0	336
Last Week	301	8	309
Same week yr ago	276	0	276
To-date/2004	6,999	91	7,090
To-date/2003	7,599	104	7,703

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

**TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
Head	1,774	1,484	3,258
Last Week	1,915	1,428	3,343
Same week yr ago	1,381	1,459	2,840
To-date/2004	46,109	37,990	84,099
To-date/2003	53,706	40,084	93,790

Source: USDA/AMS Poultry Programs, Market News Branch

**CENTRAL REGION MECHANICALLY SEPARATED CHICKEN**

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

		July 30, 2004
<u>CHICKEN</u>	PRICES	VOLUME
	(Cents per Pound)	

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

**CHICKEN, WITH SKIN ADDED**

	PRICES		VOLUME	
	(Cents per Pound)			

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	18.00	40,800	-
WTD AVERAGE		18.00		
15-20%				
RANGE	13.75-17.00	11.00-17.00	2,148,800	1,006,400
WTD AVERAGE	15.09	13.94		
20% OR MORE				
RANGE	-	-	-	-
WTD AVERAGE				

\* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

**EASTERN REGION MECHANICALLY SEPARATED CHICKEN**

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

	July 30, 2004	
<u>CHICKEN</u>	PRICES	VOLUME
	(Cents per Pound)	

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

**CHICKEN, WITH SKIN ADDED**

	PRICES		VOLUME	
	(Cents per Pound)			

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	16.50-22.25	19.00-27.00	1,018,000	416,000
WTD AVERAGE	17.00	21.72		
15-20%				
RANGE	16.50-23.00	17.50-26.00	2,386,000	1,476,000
WTD AVERAGE	17.87	18.70		
20% OR MORE				
RANGE	14.00	-	120,000	-
WTD AVERAGE	14.00			

\* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

**NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 30 JULY 2004.**

Offering prices on fresh tom breast meat were occasionally at lower levels, however, the limited trading was at unchanged prices. The market tone on fresh and frozen tom breast meat and destrapped tenders was steady to instances barely steady and demand was no better than fair. Demand was strong for fresh wing meat and fresh and frozen breast trim. Trading was active on fresh breast trim at 119.5 to 124. Thigh meat was steady to fully steady, although there were some mixed signals. Thigh trim with bone fragments moved at 42 and tails at 30 cents delivered.

**FRIDAY, JULY 30, 2004****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS		W	32.06	356	32.06	356
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 2/		W	21.00	260	20.87	300
THIGH MEAT - FROZEN		R	76.00	80	77.50	160

**THURSDAY, JULY 29, 2004****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		W	32.06	356
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		R	32.00	40
MECHANICALLY SEPARATED 2/		W	21.00	260
THIGH MEAT - FROZEN	75.00-77.00		76.00	80

**WEDNESDAY, JULY 28, 2004****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	32.00-32.50		32.06	356
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		R	32.00	40
MECHANICALLY SEPARATED 2/	21.00		21.00	260
THIGH MEAT - FROZEN	78.00-80.00		79.00	80

**TUESDAY, JULY 27, 2004****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		W	32.50	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		R	32.00	40
MECHANICALLY SEPARATED 2/	20.00		20.00	40
THIGH MEAT - FROZEN		R	70.00	80

**MONDAY, JULY 26, 2004****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		W	32.50	40
WINGS FULL-CUT - TOMS		M	34.00	40
WINGS, V-TYPE, TOM				
TAILS		R	32.00	40
MECHANICALLY SEPARATED 2/				
THIGH MEAT - FROZEN		R	70.00	80

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.